



The Media sector in Barcelona



Ajuntament de Barcelona

Edition
Barcelona City Council
Area of Economy, Enterprise and Employment
Llacuna 162
08018 Barcelona
www.bcn.cat/barcelonagrowth

With the help of



Barcelona
Media

Front page photo: konic_Alcañiz2010 (i2CAT)

Design and layout: g.grafic

D.L. (Copyright): B-20098-2012
Barcelona, May 2012

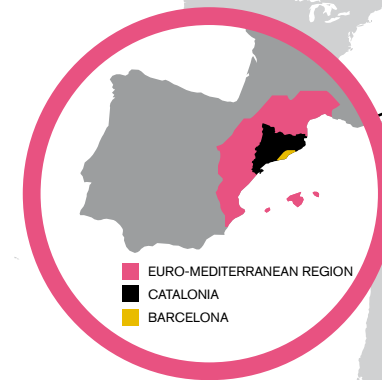
Table of contents

01.	Barcelona, the Mediterranean's innovation hub	05
02.	10 reasons to invest in Barcelona	06
03.	The Media sector in Barcelona and Catalonia	08
04.	The 10 strengths of Barcelona's and Catalonia's Media sector	
01.	A strategic sector for Barcelona and Catalonia	10
02.	Universities and research: Training and attracting talent	12
03.	The Catalan audiovisual sector, a benchmark in Spain	13
04.	Cutting edge facilities: Barcelona Media Park	14
05.	Consolidated position in the animation and creative digital industry	16
06.	Quality, tradition and innovation in the publishing sector	17
07.	Public Administration support programmes	18
08.	Support centres for innovation in the Media	20
09.	Barcelona, a strategic European partner in the Media sector	22
10.	Ideal city for Media congresses	24
05.	Links	26



01

Barcelona, the Mediterranean's innovation hub



Barcelona, located in north-eastern Spain and on the shores of the Mediterranean, is one of the principal European cities and the centre of a vast metropolitan region of more than 160 towns, and with a population of more than 4.8 million people. It is the economic, cultural and administrative capital of Catalonia and the centre of an emerging area of economic activity in Southern Europe, with 17 million people and 800,000 businesses. The Euro-Mediterranean region, including the Balearic Islands, Valencia, Aragon and the south-east of France, is positioning itself in new strategic and internationally-competitive sectors, consolidating itself internationally as a major European metropolis.

With a long industrial tradition and a dense business fabric, Barcelona has a **highly diversified economic structure**. Its more traditional sectors coexist with new emerging ones, creating new clusters of knowledge that prioritise specialisation and competitiveness, focusing on internationalisation and creating a dynamic and innovative city economy. This has helped to drive Barcelona's strategic leadership in these fields.

In 2011, Catalonia was home to more than 5,000 international companies and it received 135 foreign investment projects, 85% of which were located in and around Barcelona.

Taking into account the distribution of gross value added across business activities, Catalonia is Spain's top autonomous region in the industrial sector, accounting for 23.6% of the total market. In terms of services, it is positioned second regarding national gross value added generated.

Additionally, Barcelona's entrepreneurial activity rate in 2010 was 5.5%, above both the Spanish and European averages according to the Global Entrepreneurship Monitor (GEM) 2010.

Barcelona's international economic activities are mainly driven by the Trade Fair, the Port, Airport, the Zona Franca Consortium, Barcelona's Tourism Consortium, Barcelona City Council and its new technological innovation districts.

In addition, Barcelona and Catalonia are leading Spain's movement towards a knowledge economy. As

such, Catalonia accounts for 21.6% of Spain's innovation-based companies and 22.5% of all Spanish spending on innovation activities. 39% of companies and 49.3% of the city's employees work in knowledge-based industries, where communication and the Media have major roles.

The Media sector is highly significant for the Catalan economy both in terms of its current size and because of its future prospects. In fact, in 2010, Barcelona accounted for 61.8% of all Media workers in Catalonia. This is much higher than the city's overall percentage of workers compared to the total number of employees in Catalonia, which stood at 33.2% for the same year.

The Media industry in Catalonia has large companies that reach a global market, a variety of SMEs covering the entire audiovisual production value chain making the whole system highly efficient and competitive, good vocational training centres and excellent research at universities and R&D centres, including some companies with their own research departments.

02

10 reasons to invest in Barcelona

Barcelona offers a number of different elements that make it an attractive place to live, work and do business. Today the city is a highly interesting location for new economic activities. Some good reasons to invest here are as follows

01. Strategic geographic location

Two hours by road from France and one day from the main European cities. The gateway to Southern Europe and capital of the Union for the Mediterranean, Barcelona's port, airport, logistics parks, international trade fairs and city center are found within a five-kilometer radius.

02. Comprehensive transport infrastructure

Network of motorways connected to Europe, the fastest growing European airport; Spain's top port connected to the European railway network on international gauge track, Europe and the Mediterranean's top international cruise port, placed 4th in the world ranking; extensive metro, railway and bus network, high-speed train that will connect the city with the European network in 2013.

03. Center of a large, dynamic and diverse economic area

The Barcelona area has nearly 5 million inhabitants. It is the capital of Catalonia, with 7.5 million inhabitants, and the center of the Mediterranean Basin, an economic area with 18 million inhabitants. It accounts for 70% of Catalonia's GDP, and is the 6th largest urban area in Europe and has the 5th highest concentration in Europe in terms of industry. Catalonia has nearly 7,000 businesses working in innovation related activities, most of which are located in Barcelona and its surrounding area.

04. Successful foreign investment

Barcelona is ranked the 6th best city in Europe for business*, and Catalonia accounts for approximately 36% of all foreign investment in Spain and is home to more than 5,000 foreign companies, most of which are located in the Barcelona area.

05. Internationally renowned positioning

Barcelona tops a number of international rankings, which rate its urban environment, ability to attract foreign capital, entrepreneurial spirit and quality of life very highly.

06. Human resources prepared for the future

Barcelona now has one of the leading labour markets in Europe in terms of critical mass in high value-added sectors; highly productive, one of the best in Europe according to the OECD; 8 public and private universities; a number of prestigious business schools including ESADE, IESE and EADA; 34 international schools; wide-spread use of new technology and a natural tendency for innovation and creativity.

07. Excellent quality of life

For the 14th year running, Barcelona boasts Europe's best quality of life for employees*. It has a mild climate, sun, beaches, culture, splendid leisure time and arts programmes, a network of 4,500 educational institutions, modern and accessible health system. It is easy to get around on the public transport system and boasts beautiful parks that surround the city.

08. Large-scale urban-planning projects for the future

A complete and renewed offer in terms of intelligent land for the development of new economic projects in the main sectors of the knowledge economy, which is transforming more than 1,000 ha and 7 million m² of build surface space in Barcelona's metropolitan area.

09. Competitive real estate market

Wide range of offices, retail spaces and industrial warehouses with excellent price/quality balance and a high occupation rate.

10. Unique public/private cooperation

Barcelona City Council and the Catalan Government are highly committed to companies; the success of traditional public/private collaboration has been key to Barcelona's transformation.

*According to Cushman & Wakefield, European Cities Monitor 2011.

The Media sector in Barcelona and Catalonia

The Media sector, also called by other names like the contents, communication, creative or cultural industries, or sometimes the copyright industry, brings together all those companies engaged in the production, creation, publication, distribution, operations and management of information and experiences, amongst others, with the common goal of communication.

This sector brings together a wide variety of industries, some traditional and others emerging, and which despite their diverse backgrounds

face similar challenges. The following graph shows a classification of the various subsectors found in the Media industry.

Media subsectors

RADIO AND TELEVISION	ADVERTISING	THE PRESS	ART AND SHOWS	GAMES
SOCIAL PLATFORMS ON INTERNET	TOURISM AND LEISURE	THE FUTURE	BOOK PUBLISHING INDUSTRY	SEARCH ENGINES AND PORTALS
CULTURAL HERITAGE	AUDIOVISUAL PRODUCTION AND ANIMATION	INTERMEDIATION AND ELECTRONIC COMMERCE	MUSIC	DESIGN



The wide reaching and growing content sector has emerged as a result of the digitization process and ongoing convergence of networks and devices. What this amalgam of industries has in common is that they are intensive users of ICT, with an increasing impact on the very heart of the economy and in direct contact with millions of users through multiple channels and devices.

Highly aware of its importance, the business sector and public administration in Barcelona and Catalonia are developing the industry to make it one of Europe's core business areas in this field.

Catalonia has highly favourable conditions for the development of a powerful content industry. Historically, the publishing, film and graphic and plastic arts industries have all make the most of Barcelona's and Catalonia's traditionally creative

and productive environment. More recently, the growth of audiovisual creativity in television, advertising, animation, video and content industries across new formats and services have leveraged the country's resources in terms of human capital, infrastructure and entrepreneurial dynamism.

At present, new possibilities and opportunities are arising thanks to an increase in social networks, the availability of audiovisual content and the rise of smart phones, tablets and other mobile devices.

10 reasons to invest in the Media sector in Barcelona

- 01** A strategic sector for Barcelona and Catalonia
- 02** Universities and research: Training and attracting talent
- 03** The Catalan audiovisual sector, a benchmark in Spain
- 04** Cutting edge facilities: Barcelona Media Park
- 05** Consolidated position in the animation and creative digital industry
- 06** Quality, tradition and innovation in the publishing sector
- 07** Public Administration support programmes
- 08** Support centres for innovation in the Media
- 09** Barcelona, a strategic European partner in the Media sector
- 10** Ideal city for Media congresses

10 reasons to invest in Barcelona and Catalonia's Media sector

01. A STRATEGIC SECTOR IN BARCELONA AND CATALONIA

Catalonia is a country with its own culture, and as such it is sensitive to the consequences of the growing process of cultural globalization. This is the reason why governments and public authorities have been carrying out specific programmes to support the Media sector.

At the time, the creation of the Catalan Broadcasting Corporation (CCMA) was the starting point for many of the businesses, professionals and artists that today make up this dynamic industry. Because of its size, it played a central role in the development of the audiovisual industry, which has since been complemented by such fields as



Catalan Audiovisual Council headquarters

animation, advertising, video games and content and services distributed on the internet and through mobile devices.

Another noteworthy addition was the creation of the Catalan Audiovisual Council (CAC), a pioneering regulator responsible, among other things, for ensuring respect for the rights of viewers and the freedom of participants in the audiovisual market and for ensuring regulatory compliance and the impartiality of public broadcasters and media.

The Media industry in Catalonia has large companies that reach a global market, a variety of SMEs covering the entire audiovisual production value chain making the whole system highly efficient and competitive, good vocational training centres and excellent research at universities and R&D centres, including some companies with their own research departments.

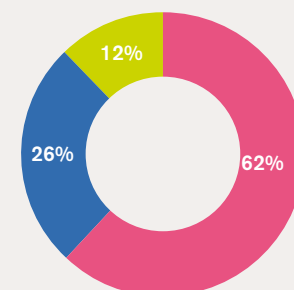
Regarding challenges for the future, Catalonia has laid the foundation for

the creation of one of the main Media centres at both the European and international level. Thanks to public-private collaborations across different projects (such as Barcelona Media Park) and new investments by companies, Catalonia is both a competitive and modern location for the sector. As such, we can highlight specific initiatives at both the city and the Cultural Strategic Plan level, which is led by the Institute of Culture, and at the metropolitan level, via the Barcelona Metropolitan Strategic Plan.

Amongst the common features seen in the various activities that shape the media sector we find a high level of expertise and modern network operations that facilitate the entry of new innovative companies into the value chain.

The Media sector is highly significant for the Catalan economy because of its current size and its future possibilities.

Distribution of the number of employees in terms of activities related to the Media in Catalonia. In terms of regional areas (2010)



Source: The Work Observatory. Autonomous Regional Government of Catalonia (2011)

As such, in 2008 this sector's contribution to Catalonia's Gross Added Value was 6.525 billion Euros, almost 4% of Catalonia's GDP. On the other hand, the number of people working in this sector rose to above 155,000 in the same year in Catalonia, which is clearly higher than the Spanish average, and which makes this the leading sector in the knowledge-based economy in Catalonia.

With its very high growth potential, this sector helps foster the development of ICTs, which are used intensively in this business, and the promotion of local culture globally at the same time.



Imagina building and Mediapro's headquarters

Examples of business leadership:

- **Grupo Planeta:** Media group with almost 5,000 workers, a leader in the production of cultural content for Spanish language markets. Based in Barcelona, it is the leading Spanish publishing group and among the three major Media groups operating in Spain. The Group has positioned itself in the top 10 publishers in the world over the last decade, becoming a leader in the Spanish language market. It offers a wide range of culture, information, training and entertainment products.

- **Grupo Godó:** Important leader in Catalonia across all relevant communications Media. Its origins date back to 1881 with the creation of the newspaper La Vanguardia. It was reorganized in 1998 as a multimedia holding company with activities in newspapers, magazines, digital publications, Internet portals, radio, television and in the field of programme production.

- **Media Planning Group:** Founded in 1978 as the first media agency in the Spanish market, it remains the leading player in this market. After a merger with the French media agency Mediaplis in 1999, it is now part of the global communication Havas Group, which is the sixth largest media group in the world. It has a network of agencies specializing in interactive conventional media, in sports sponsorship and branded entertainment and an alternative network of media agencies.

- **Mediapro:** One of the leading European audiovisual groups. It has operations across the whole value chain in audiovisual production, management of sports rights and film, and the production and distribution of entertainment, with 2,000 professionals and offices in Spain, Lisbon, Porto, Madeira, Amsterdam, Budapest, Miami, Los Angeles, Qatar and Dubai. Mediapro is also a shareholder in La Sexta television channel and several other themed channels.

Barcelona, capital of Catalonia, is where we find the majority of these activities. According to 2010 data, this city accounts for 61.8% of all Media workers in Catalonia, well above the 33.2% level which represents the total number of workers

in Barcelona as a percentage of all workers in Catalonia during the same year.

10 reasons to invest in Barcelona and Catalonia's Media sector

02. UNIVERSITIES AND RESEARCH: TRAINING AND ATTRACTING TALENT

In Catalonia, the Media sector is among the leading knowledge-intensive industries. Its continuity and future development requires an environment that will attract and generate the talent needed to continuously stimulate the innovation process. Catalonia and Barcelona guarantee this stimulus because they have knowledge centres that provide greater competitiveness for industry professionals, both locally and internationally.



Blanquerna Faculty of Communication Sciences, University Ramon Llull

Universities and other training institutions

Catalonia has a total of 12 universities with more than 300,000 students. There are under graduate and graduate studies in virtually all areas related to the world of communication including audiovisual communication, advertising and public relations, translation and interpretation, linguistics, computer science, journalism, telecommunications, information technology, audiovisual media, cognitive science and language, amongst many others.

In terms of specialized training programmes, there are technical and degree level courses as well as masters in a wide variety of materials such as video gaming, creative documentaries, design, performing arts and special effects.

Regarding university research, Catalonia has more than 550 research groups, 137 R&D centres and over 300 university departments, among which we find several groups dedicated to research into the creation, distribution and use of content, especially in

the development of enabling technologies. We also find other essential research for the communications sector including the study of users both at the sociological, ethnographic, psychological, cognitive and perception levels, as well as in the more functional aspects of use and interface design.

In terms of business studies, Barcelona has several international renowned business schools, including IESE, ESADE and EADA, which complement other institutions offering training in the Media field.

Higher Education and Research related to the Media:

- University Pompeu Fabra
- Autonomous University of Barcelona
- University of Barcelona
- Polytechnic University of Catalonia
- University Ramon Llull
- Open University of Catalonia (UOC)
- Higher School of Cinema and Audiovisuals of Catalonia
- Higher School of Music of Catalonia

03. THE CATALAN AUDIOVISUAL SECTOR, A BENCHMARK IN SPAIN

Catalonia has been one of the drivers of the television, radio and film industry in Spain, because of its precocity, size and innovation in terms of content and formats.



Cadena Ser radio studios, previously Ràdio Barcelona

In terms of the radio, Barcelona was a pioneer in Spain (Radio Barcelona issued its first 30 minute news bulletin in 1924) and remains a leader in programme production, having launched new creative talent that leads audience figures and that in many cases has made the move to other forms of mass communication (television, film, literature, etc).

Regarding television, Catalan producers are amongst the most successful in Spain, responsible for some of the most successful and influential programmes seen in the last decade, which in turn has also promoted the emergence of local television stations, theme channels, etc... At particular moments, companies like Gestmusic-Endemol, Mediapro, El Terrat or Lavinia have been responsible for much of the innovation in Spanish television and in some cases the world.

In fact, in Catalonia the audiovisual sector is one of the few that has leading large company decision-making centres, like Filmax, Mediapro, Cinesa, Manga films and Planeta, amongst the most noteworthy. This sector is capable of forming a powerful industry.

In the world of cinema, Catalan producers are leading a resurgence in this business thanks to important national and international projects. As such, we can highlight activities in areas like production and distribution.

Apart from large production companies, there are nearly 200 smaller television and film producers in Catalonia that generate some of the most unique and groundbreaking Spanish audiovisual content. Apart from successes in terms of fictional feature films, a significant group of creative entrepreneurs have found successes and international recognition for their documentary productions, TV series and TV movies.

Catalonia and Barcelona in particular has established itself as one of the benchmarks in advertisement production in Europe. We shouldn't forget that at present investments in traditional advertising are decreasing, and now the focus is on Internet advertising. The presence of first rate advertising creatives, talent, production and support industries has made the city into an inspiration, source and setting for many global campaigns.

04. CUTTING EDGE FACILITIES: BARCELONA MEDIA PARK

Catalonia is a privileged location for Media companies that regard user-centric innovation as their present and future. What we find in Barcelona and its hinterland is a dynamic business environment, made up of large and small businesses, with an influx of talent, training and research, and significant infrastructure projects in this sector.

Media companies and traditional operators that have set up all over Barcelona, and audiovisual and media companies that have located in the south of the city, and the rest of the Media sector now have modern facilities available in the so-called Barcelona Media Park sited in the 22@Barcelona technology district, which is undergoing constant consolidation and growth. We also have the recently created Catalan Audiovisual Park in the neighbouring city of Terrassa. In addition to these two strategic areas for the sector, we need to include the BZ Barcelona Innovation Zone, located in Barcelona's Zona Franca, which is set to become a new cluster promotion for the Media sector.

Barcelona Media Park is an open space at the heart of the city, well positioned in the sector in the South of Europe, providing an environment for collaboration and exchange between companies, universities, institutions and citizens, focusing on excellence in research, technology transfer, innovation and training and culture. It is located at the heart of 22@Barcelona, the city's new centre for knowledge economy activities, where the majority

of companies from the Media, Medical Technologies, ICT, Energy and Design sectors have located. This area boasts cutting edge telecommunications and transport infrastructure, and here we also find different public and private sector backed projects being developed with the aim of promoting the competitiveness of firms located in this area.

Barcelona Media Park is the most important flagship project being developed in 22@Barcelona and the city of Barcelona regarding creative and cultural industries. It has 115,000 m² available for companies and 60,000 m² for services in the communication sector. It is made up by the University Pompeu Fabra, 22@Barcelona, Grupo Mediapro and Barcelona Media Innovation Centre (the management company), and it boasts all the necessary requirements to make this cluster a success:

- Large, medium and small businesses

Some of the most representative companies are: Spain's National Radio (RNE) and Barcelona Television (BTV), in the public sector, and Mediapro, Lavinia, International Sound Studio, ADN, Cromosoma,

BASSAT Ogilvy, Apuntolapospo, Canonigo Films, Cuatro, Garage Films, Sonoblok, Vistaprint, the publishing group RBA, Miraveo, Apeer, BMAT and InOutTV, amongst others in the private sector.

- Benchmark Institutions

The Catalan Audiovisual Council (CAC) and Barcelona Media Foundation are representative examples, with the latter being the overall manager of the Cluster and whose task it is to ensure the connection and interaction of its different parts and the promotion of initiatives to strengthen companies' competitiveness, and finally to improve the position of Barcelona as a benchmark in this area.

- Universities and other training centres related to the Media

The UPF's Communication Campus (24,000m²), where we find the Audiovisual Communication, Journalism, and Advertising and Public Relations Faculties. Additionally, the campus also plays host to the Centre of Resources for Learning and Research (CRAI), the University Audiovisual Institute (IUA), the Science Communication Observatory (OCC), and the Graduate Institute of Applied Linguistics (IULA). Nearby is the SAE Institute, an internationally renowned higher education centre related to the Media world.

- Technology Centres, R&D and technology transfer

These are key and essential requirements to ensure continued and shared

innovation in a sector that is highly technological and evolving at high speed, and also to orient university research to market output. Some of the most prominent centres are the Barcelona Media Innovation Centre (CIBM), Barcelona Digital Technology Centre ICT, the Internet Interdisciplinary Institute (IN3) and the eLearn Center at the Open University of Catalonia. Furthermore, the location of the first European research laboratory Yahoo! Research Barcelona in Barcelona Media Park is a clear example of how innovation ecosystems like 22@Barcelona are determining factors in attracting talent.

- Other knowledge infrastructure in the vicinity of the Park:

1. Barcelona Activa's multi sector incubators: **Glòries Business Incubator** (4,000 m²) and **Almogàvers Business Factory** (1,000m²) with a high percentage of projects linked to the Media and audiovisual sector.
2. The **Tànger building**: Focused on University Pompeu Fabra research groups or start-ups linked to the Media world, such as the UPF's Musical Technology Group (creators of the popular musical instrument, the Reactable) or the Computational Imaging Research Group and Biomedicine Simulation Technologies (CISTIB), also part of the UPF.
3. The **Imagina building**: With almost 12,000 m² for companies and institutions involved in the media sector and a large audiovisual production centre

equipped with a 2,000 m² studio set and other smaller sets, and post production rooms, satellite transmitters and receivers that are used daily for programmes on la Sexta, GoITV, BesTV, La Fabrica, amongst others.

4. Media-TIC building: 14,000m² of space for companies, research, training and exhibition projects.

5. Creative Talent Factory: The Digitalent Foundation (promoted by Abacus and Cromosoma, amongst others) with a 100,000 m² studio set and other technical areas.

Barcelona Media Park in figures

- 15,000 m² for offices for the audiovisual industry
- 60,000 m² for services related to the communication sector
- Over 6,000 m² for studio sets and spaces equipped for productions, post-production, etc., making approximately 10 studio sets and 42 post-production facilities.
- Creation of 1,000 jobs
- It plays host to between 3,500 and 4,000 members of the university community (students, teachers, researchers and administrative staff)



Barcelona Media Park sited in 22@Barcelona



Pompeu Fabra University's Tànger building

10 reasons to invest in Barcelona and Catalonia's Media sector

05. CONSOLIDATED POSITION IN THE ANIMATION AND CREATIVE DIGITAL INDUSTRY

Catalonia leads the animation industry in Spain, with some of its most powerful companies making the move to European leadership. In 1984 we saw the first computer animation that allowed local companies to position themselves in the international market with innovative proposals. Today, these pioneering companies are now fully consolidated, having been joined by others that have also exported their successes around the world, such as Cromosoma, with their hand-crafted quality products.



The animation industry in Catalonia has built up a group of cutting edge professionals involved in some of the most important American and European animation productions. Digital creation has also led to significant Catalan companies working in the area of videogames, television design and special effects with a strong presence in local, European and North American markets, like Digital Legends and Novarama. Both animation and digital creation or video games companies have significant growth potential because of the universal appeal of these products and their ability to generate additional revenues through the sale of licensed products.

This quality and abundance of talent has resulted in leading international companies making large investments to set up in Barcelona and Catalonia

in order to make products for the global market. A case in point is leading video games producer Ubisoft and social games specialist Digital Chocolat.

As well, the film and TV and video industries have benefited from investments in the digitization of a large number of cinema halls.

The latest trends in performing arts also benefit from the innovative capacity of the digital artists, with theatre groups and internationally renowned artists producing shows that incorporate innovative digital content from local creatives, which afterwards is released in other parts of the world. So, it's not surprising that Barcelona hosts several internationally renowned festivals in these areas.

06. QUALITY, TRADITION AND INNOVATION IN THE PUBLISHING SECTOR

Catalonia has a longstanding publishing tradition represented by large publishing groups like Planeta, Random House Mondadori (part of the Bertelsmann Group), Océano, RBA, Salvat (part of the Lagardère Group), Zeta and other smaller publishers. In addition, Catalonia, together with Andalusia and Madrid, head the rankings regarding the digital and ebook sectors across Autonomous Communities.



Barcelona is the capital of the book sector in Spain and it is the worldwide market leader in Spanish-language books. Books are amongst Catalonia's highest volume exports, which are destined for markets in the European Union and Latin America.

Barcelona is the capital the publishing market in Catalan with Enciclopèdia Catalana and Grup 62 leading this sector.

On the other hand, digital books are gradually gaining market share in Spain. In 2011 this product sector represented 17.9% of all book titles, 55% more than the previous year, according to data published in a report on digital books by the Ministry of Education, Culture and Sports.

This data shows that Spain's publishing industry, with a majority of companies headquartered in Barcelona, are committed to digital books.

As such, one example is the case of Edi.Cat, a pioneer regarding the promotion of digital books in Catalan and the sale of electronic books and digital readers, and made up by independent

small and medium sized publishers. As such, the distributor Librandia, founded by 7 large Spanish publishers (Planeta, Random House Mondadori, Roca Editorial, Grup62, Grupo Wolters Kluwer and Grupo SM) offers digital services management to on-line market publishers and retailers.

At the same time, the book business and bookstores in particular are also moving towards the world of digital books, with initiatives like e-libraries. cat, part of the Catalan Bookstore Owners' Guild, which aims to become a real solution for achieving Internet presence and that can be used to sell books or to get updated profiles on social networks.

As such, as noted in a report on digital books over the coming years we will continue to see an important increase in the Spanish digital book market, thanks to an increase in supply and the proliferation of bookstores and platforms which cover the distribution and sale of eBooks.

10 reasons to invest in Barcelona and Catalonia's Media sector

07. PUBLIC ADMINISTRATION SUPPORT PROGRAMMES

Catalonia and Barcelona is an ideal environment for innovative companies in the Media sector that enjoy a competitive and innovative environment and are able to take advantage of all the R&D carried out by different programmes.

With the objective of improving and raising innovation capacities, Spain's Administration has made a significant commitment to R&D and innovation with significant increases in public investment in these areas.

Some of the most significant **Spanish funding sources** include:

- **Neotec:** Coordinated by CDTI (Centre for Industrial Technological Development), it aims to support the creation and consolidation of new technology-based companies. It offers 0% interest loans, long repayment terms that do not require additional guarantees, and which cover up to 70% of the total project budget.
- **Enisa:** This is the National Innovation Company, financed by the public purse, part of the Ministry of Industry, Energy and Tourism, through the

Directorate General for SME Policy. It focuses on the use of new financial instruments to support SMEs. They offer equity loans.

- **Torres Quevedo:** Part of the Ministry of Economy and Competitiveness programme offer, it provides subsidies to companies, business associations and other technology centres for the hiring of researchers.
- **Inncorpora:** This is a Ministry of Economy and Competitiveness programme that aims to support and strengthen the recruitment of highly qualified personnel in order to stimulate the transfer of knowledge and technology to the productive sector and promote business innovation.
- **Innpacto:** This is a Ministry of Economy and Competitiveness programme for financing public-private



R&D&I cooperation projects with between research organizations and companies.

- **Individual Research and Development Projects (PID):** Individual Research and Development projects (PID) are applied business projects designed to create and significantly improve production processes, products or services. These projects may include both industrial research and experimental development.

- **Innpromta Programme:** This is one of the central government's policies designed to promote public-private R&D in strategically important areas for developing the Spanish economy.

This programme is designed to fund large integrated industrial research projects that create new technological applications in areas that will have an influence at the international level both economically and commercially.

- **Plan Avanza:** This Ministry of Industry, Energy and Tourism programme is based on loan financing for purcha-

sing computer and Internet connections to improve business processes.

The **Catalan government** is committed to creating a powerful Media industry that is innovative and a leader in the European framework. One of the key agencies in this policy is the Autonomous Regional Government's Department of Enterprise and Employment that aims to foster the competitiveness of companies and provide alternative financing:

- **ACCIÓ Risk Capital Funds:** ACCIÓ currently participates in the following active venture capital funds: Ingenia Capital, Inveready Seed Capital and Ysios BioFund I.

- **BCN Emprèn, Spinnaker Media, Nauta Tech Invest II, Nauta Tech Invest III, Highgrowth Innovació and Catalana d'Iniciatives,** with the participation of other Autonomous Regional Government of Catalonia agencies.

- **Credit lines:** Financing provided by the Catalan Institute of Finance, the INICIA network, CDTI, ACCIÓ's NEBT loans, ENISA and ICO.

- **Loan guarantee lines:** Loan guarantees given by Avalis de Catalunya for loans with predetermined conditions for financing capital expenditures.

- **Tax incentives for R&D:** Deductions against income tax.

- **Help to find capital, investment forums, Network of Technological Springboards and XIP (Network of Private Investors or Business Angels).**

Meanwhile, the **European Union** also participates in this group of institutions involved in aiding Media sector growth in its own territory, offering a range of support programmes and grants:

- **Seventh Framework Programme**
- **Media Programme**
- **Structural Funds**

10 reasons to invest in Barcelona and Catalonia's Media sector

08. SUPPORT CENTRES FOR INNOVATION IN THE MEDIA

To achieve a competitive Media sector it is necessary to have both powerful R&D&I and the right infrastructure and support tools to facilitate technology and knowledge transfer to companies from the public and private research that is generated. This transfer can be seen in terms of new R&D&I projects, the commercialization of patents or the creation of new technology-based companies, amongst others.

In Catalonia, following the European model adapted to local conditions, there are complementary organizations specialising in the promotion of knowledge transfer from universities to business.

Barcelona Media

This is a private foundation for research and innovation in the communication sector. It is an Advanced Technology Centre, member of the Autonomous Region Government of Catalonia's TECNIO network, which works with companies and institutions to boost competitiveness. They carry out transfer and innovation projects in the contents area, with extensive experience in the creation of large consortia for collaboration projects, and it is also a leader of European Commission projects related to the Media sector. Framed in the Barcelona Media Park initiative, this foundation acts as a regional cluster and independent meeting place for industry, academia and different levels of government

www.barcelonamedia.org



Yahoo! Research Barcelona

An example of integration in the innovation system: The new global media company Yahoo! has decided to increase its investment in R&D and that's why it is always looking for environments with the best talent and where it can facilitate its integration into the European research system. Managed by Dr. Ricardo Baeza-Yates, Yahoo! is based in Barcelona Media facilities, which provides the professional research and management capacity for outsourced management and R&D hosting, and which was the reason that Yahoo! Research ended up committing to Barcelona for its first European site dedicated entirely to research.

www.research.yahoo.com

i2CAT

This Foundation is dedicated to promoting research and innovation into second generation internet. The i2CAT Audiovisual Unit is a joint department, made up by i2CAT and the UPC, that has different research interests related to technologies used in multimedia, cultural, education and tourism industries. Thanks to their participation in various national, state, European / international projects via collaboration with leading Catalan audiovisual companies, they have been able to achieve a huge step forward in the state-of-the-art especially in the following areas: coding and the distribution of audiovisual content across the net, videoconferencing, metadata and mobility services.

www.i2cat.net



10 reasons to invest in Barcelona and Catalonia's Media sector

09. BARCELONA, A STRATEGIC EUROPEAN PARTNER IN THE MEDIA SECTOR

In Barcelona we find a number of key features (a strong business, economic, and educational background) that have allowed the city to position itself as an international benchmark in the creative and media sectors in recent years. This has not come about by chance, but is rather the result of a strong and continuous process of strengthening and the consolidation of these environmental aspects.

One effect of this today is the creativity, research, technological innovation and the training programmes we find on offer, which are some of the distinguishing factors that makes Barcelona different to other cities in the Mediterranean and the world in the creative and Media sectors.

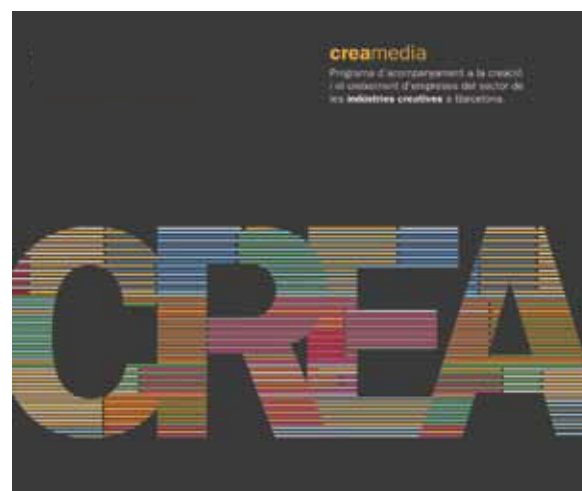
Currently, this model is recognised internationally, which makes the city a key player in the development of international networks and projects.

A national and international benchmark model

Thanks to the city's economic promotion strategy and the serious and consistent work done in recent years in this area, Barcelona has received several international and national awards: for its **Creamedia** programme -a tailor-made programme for accompanying the creation and growth of companies in the creative industries sector and developed by the Local Development Agency,

Barcelona Activa-; the European Business & Innovation Centre Network (EBN) awarded Barcelona the **"European Best Tools Awards"** (2009); the city was chosen by the World Bank as one of the **best practices in business incubation** at its meeting in New Delhi (2004). Likewise, successful methodologies to promote the creation and growth of firms and human capital management has resulted in applications in environments as diverse as Cape Town (South Africa), Buenos Aires (Argentina), Medellín (Colombia) or Brazil.

In Spain, Barcelona received the **"City of Science and Innovation"** Award in 2011 from the former Ministry of Science and Innovation for the city's efforts and commitment to R&D&I and for its commitment to changing the overall production process. In 2009, the then Ministry of Industry, Tourism and Trade awarded Barcelona's **Advisory and Processing Start Point (PAIT) service first prize**, a service located in Barcelona Activa.



A networked city

In an increasingly global world being part of or, on many occasions, leading international networks is essential to consolidate a city's own model of economic promotion, one that is open, wide ranging, and that allows you to position yourself internationally. This model should be directed at making sure a city has a voice that makes it visible in the world and that it is a leader in strategic areas of the knowledge economy.

As such, Barcelona participates in more than 20 international city networks at different regional levels (national, Mediterranean, European and international). Of these, the networks that place a greater emphasis on creating an environment that facilitates the growth of knowledge-intensive activities are: **Eurocities**, in which Barcelona holds the vice presidency and participates in the working group on entrepreneurship; **LEED-OECD**, which promotes economic development and local employment, and the **European Business & Innovation Centre Network (EBN)**, aimed at promoting, encouraging and developing innovation in SMEs.

From a perspective of collaboration on specific projects, Barcelona works with other cities on different EU funded projects, with special emphasis in the Mediterranean area. Among those more directly related to the media sector, we find:



"CREATIVE METROPOLES" Public Policies and Instruments to support the Creative Industries. (Interreg IVC)

Partners: Riga (Latvia), who leads the project, Barcelona, Helsinki (Finland), Tallinn (Estonia), Vilnius (Lithuania) Oslo (Norway), Stockholm (Sweden), Warsaw (Poland), Amsterdam (Netherlands), Birmingham (UK) and Berlin (Germany).

Objective: To Create flexible and efficient local public support for the creative industries in project member cities in order to contribute to sustainable development at local, national and European level.

Project finished. More information:

www.creativemetropoles.eu



"MED KED" Development of Knowledge-based Entrepreneurship in the Mediterranean (Interreg IVB Med).

Partners: ASTER (Italy), who leads the project, Barcelona Activa, the Province of Milan (Italy), Ljubljana Technology Park (Slovenia), and the Foundation Sophia Antipolis (France).

Objective: To promote entrepreneurship based on the knowledge economy across the different participating regions by improving their entrepreneurship profiles and that of their respective potential areas, and increasing the participation of different stakeholders (government, research, industry, finance and support organizations) in the development of public policies to support entrepreneurship based on the knowledge economy.

www.med-ked.eu/



"CLUSNET" (Interreg IVC).

Partners: Greater Lyon (France), who leads the project, Barcelona Activa and the cities of Budapest, Dortmund, Munich, Leipzig (Germany), Eindhoven (Netherlands), Gothenburg (Sweden), Helsinki, Manchester, Stockholm Business School, and the EUROCITIES network.

Objective: To improve the effectiveness of local support policies for business environments in various European regions, analysing existing support policies and making recommendations for improvements.

Project finished. More information:

www.clusnet.eu



Innovation in Services

ImMediaTe

ImMediaTe - Europe Innova

Partners: Cap Digital (Paris), Fondazzjoni Temi Zammit (Malta), IIP Create (Amsterdam), 22@Barcelona (Barcelona), Innova (Rome), Living Labs Global (Copenhagen), Media-deals (Paris), Institute of Electronic Business (Berlin), and Media Business School (Madrid).

Objective: To improve the value of digital media and creative industries through innovative business models and services.

www.europe-innova.eu

The conjunction of having the right environment for creative industries and the Media sector present in Barcelona, the many awards received for projects and initiatives taking place in the city, and its participation in international networks and projects, with a particular emphasis at the European and Mediterranean level, have all made Barcelona an international benchmark in the Media and creative sectors, and a strategic partner to develop projects with at the European and Mediterranean level.

10. IDEAL CITY TO HOLD MEDIA CONGRESSES

Barcelona organises various events related to the Media sector, showing that the city is at the forefront of technology and an ideal destination to meet tomorrow's challenges and implement highly innovative projects.

In addition, Barcelona is placed second in the ICCA (International Congress & Convention Association) rankings in terms of being an ideal city to host conferences and professional meetings.



Amongst the main Media events organised in Barcelona, we find:

SONAR_MUSIC INDUSTRY

The Sónar International Festival of Advanced Music and Multimedia Art takes place annually in Barcelona in June and this year it is celebrating its 19th edition. The festival is one of the essential international events for professionals and enthusiasts in the music field, and also those from other creative, cultural, technology, design, audiovisual and new media industries.

The June 2011 edition was attended by 2,091 accredited professionals from 35 countries, 833 companies (13% more than in 2010), with an audience of 79,454 people across all events.

GAMELAB_VIDEOGAMES

The Gamelab International Videogaming and Interactive Entertainment Fair is the official meeting for professionals and companies in the video game industry in Spain, and which this year reached its 8th edition.

The fair is one of the must-attend events in this industry's international calendar, being the main representative of not only the Spanish market, but also the emerging Latin American and Spanish speaking markets. The 2011 edition was attended by some 3,000 people, 40% of them with a professional profile. Fifty percent of those taking part in the conference and activity programme were professionals, journalists and international managers.



DOCSBARCELONA_DOCUMENTARIES

DOCSBARCELONA International Documentary Film Festival is the industry benchmark for documentary pitching and a rallying point for industry professionals from around the world, which this year has reached its 15th edition.

During the 2012 edition, 306 professionals from 33 countries participated in the project finance market (Pitching Forum) and 6,965 spectators attended the Festival, which overall represented an increase of 38% on the previous edition.

Testimonials about Barcelona and its Media sector:

"Barcelona has, is, and will be a perfect cocktail of modernity, innovation and creativity in a privileged location. Who can beat it?"

Enric Jové
Managing Director at McCann Erickson Barcelona

"Barcelona is a city that is open to innovation, with a rich history in architecture and design and a unique quality of life, whilst also being cosmopolitan and family orientated."

Ricardo Baeza-Yates
Yahoo! Inc. Yahoo! Inc. VP of Research for EMEA and Latin America.

"Barcelona dwells in the imagination of the world. But in reality we find so much more. Barcelona dazzles! It is a great city, with great energy, great architecture, great food and great football."

Jonathan D. Aronson
Professor
School of Communication
Anneberg School for Communication & Journalism

Links

Education Centres

University Pompeu Fabra (UPF)
www.upf.edu

Autonomous University of Barcelona (UAB)
www.uab.cat

University of Barcelona (UB)
www.ub.edu

Polytechnic University of Catalonia (UPC)
www.upc.edu

Ramon Llull University (URL)
www.url.edu

Higher School of Cinema and Audiovisuals of Catalonia (ESCAC)
www.escac.es

Higher School of Music of Catalonia (ESMUC)
www.esmuc.cat

ESADE
www.esade.edu

IESE Business School
www.iese.edu

EADA
www.eada.edu

EAE
www.eae.es

R&D&I and knowledge transfer

Barcelona Media Innovation Centre
www.barcelonamedia.org

i2Cat
www.i2cat.net

Local and regional agencies

22@Barcelona
www.22barcelona.com

ACC10 - Government of Catalonia
www.acc10.cat

Barcelona Activa
www.barcelonactiva.cat

Barcelona City Council
Institute of Culture
www.bcn.cat/cultura

Barcelona City Council
Area of Economy, Enterprise and Employment
www.bcn.cat/barcelonagrowth

Barcelona-Catalunya Film Commission
www.bcn.cat/filmcommission.com

Catalan Broadcasting Corporation (CCMA)
www.ccma.cat/pccrtv/ccrtvSeccio.jsp

Catalan Audiovisual Council
www.cac.cat

Catalan Institute of Cultural Industries (ICIC). Ministry of Culture.
Government of Catalonia
www.gencat.cat/cultura/icic

State agencies

Ministry of Economy and Competitiveness
www.mineco.gob.es

Ministry of Industry, Energy and Tourism
www.minetur.gob.es

Business organizations

Barcelona Chamber of Commerce
www.cambrabcn.org

AMETIC (Spanish Business Association of the Electronics, Information Technology, Telecommunications and Digital Content sectors)
www.ametic.es

European and international Organisms

EU Structural Funds
www.minhap.gob.es/es-ES/Areas%20Tematicas/Fondos%20de%20la%20Union%20Europea/Fondos%20Estructurales/Paginas/Fondos%20Estructurales.aspx

Seventh Mark Programme (2007-2013)
http://europa.eu/legislation_summaries/energy/european_energy_policy/i23022_es.htm

Media Programme
http://ec.europa.eu/culture/media/programme/index_en.htm

Culture Programme (2007-2013)
www.mcu.es/cooperacion/MC/PCC/ProgramaCultura2007/Cultura2007Dir.html

E-Content Plus
http://ec.europa.eu/information_society/activities/econtentplus/index_en.htm

WIPO
World Intellectual Property Organization
www.wipo.org

Funds and financing

Catalana d'Iniciatives
www.iniciatives.es

Catalan Institute of Finance
www.icfinances.com

Official Credit Institute
www.ico.es

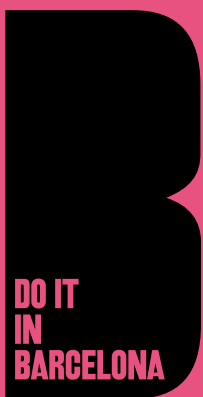
Avalis de Catalunya
www.avalis-sgr.cat

ENISA
National Innovation Company
www.enisa.es

BANC. Business Angels Network Catalunya
www.bancat.com

NEOTEC (CDTI) - Ministry of Economy and Competitiveness
www.cdti.es/index.asp?MP=7&MS=156&MN=3





With co-financing

